

10/8/2019

[#XTNI-26838] Turlock, CA - Employee Import Issue

(PTS: 1/8/2019) Turlock, CA - Timekeeping Imp (Self-Hosted/New World/Mobile/Clocks) (D) (XTNI-16143)

[XTNI-26838] Turlock, CA - Employee Import Issue Created: Aug/23/2018 Updated: Oct/09/2018 Due: Aug/28/2018 Resolved: Oct/09/2018

Status:	Resolved
Project:	Moved - Read Only - XTNI - New Implementations
Component/s:	None
Affects Version/s:	None
Fix Version/s:	None



Type:	Sub-task	Priority:	Medium
Reporter:	Suzanne Greene (Inactive)	Assignee:	Suzanne Greene (Inactive)
Resolution:	Fixed	Votes:	0
Labels:	None		
Remaining Estimate:	0 minutes		
Time Spent:	53 minutes		
Original Estimate:	Not Specified		

Attachments:	<input checked="" type="checkbox"/> Employee.csv
Customer:	Turlock, CA

## Description

## BILLED

8/31/18 10m Billed

From: Greene, Suzanne

Sent: Tuesday, August 21, 2018 3:33 PM

To: 'Alison Arias' &lt;AArias@turlock.ca.us&gt;; 'Taryn Perry' &lt;TPerry@turlock.ca.us&gt;

Cc: Henderson, MyKeya &lt;MyKeya.Henderson@tylertech.com&gt;

Subject: ExecuTime/Turlock, CA - System Overview Call

Good Afternoon,

Thank you both for taking additional time with me today to go over your system configuration. Please see below a recap of items discussed. ☺

- Semimonthly
  - o Per the negotiation this year they will remain using a semimonthly pay period
- Unique Scenario
  - o Every Employee is considered salaried on the New world Side
  - ☐ Everyone automatically receives 86.67 hours per pay period in New World
  - ☐ Since they will remain on a semimonthly pay period, if they clock in mon-fri the hours don't match each pay period this is why they automatically populate 86.67 in New World.
- Part time employees, Full time employees and Supervisors will utilize ExecuTime
  - o Supervisors and Full Time employees will only enter exemptions in ExecuTime.
  - o Supervisors will also approve time cards and time off request.
  - o Part time employees will be the only ones actually clocking in/out
  - o We will export the part time employees (they will be clocking in and out and we do pay them on their hours unlike everyone else)
  - ☐ Part time doesn't receive overtime or comp time. If they do receive it that would be a manually added by a supervisor.
  - o For everyone else we would send over Exceptions
- Overtime and Comp Time Policies
  - o There will not be a policy used in ExecuTime since only part time employees will be clocking in/out.
  - o The supervisor will manually add any overtime and or comp time.
- Locations and Employee Types
  - o They are used as a grouping mechanism within ExecuTime.
  - o Locations go with your polices (overtime /comp time)
  - o Employee types are used for your holidays
  - o Locations and employees types would have to be manually updated whenever you add a new employee in the system.
  - ☐ You can update the location and employee type via an employee's profile by going to System Admin > Master File Management > Employees > Edit the employees profile > Go to the Pay properties tab and you will see a drop down for "Default Locations" as well as "Employee Type".
- Holidays
  - o We will populate the holidays in ExecuTime side for visual purposes only.
  - o This pay code HO that we will use to populate holidays will NOT export over to New World.
  - o When HOL USED is on the time card this WILL go over to New World.

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- Auto Deductions
  - o They will not use auto deductions since part time employees will clock in/out if they take a lunch.
- Part Time Employees
  - o Prof Stand PT - Cadet - COMM PT - PT Typist - PT Human Res
  - ☐ Certain employees will clock in using the above pay codes instead of REG/PT
  - o The version they are on does not have the option for "Default Clock In/Out Pay Code"
  - ☐ I will upgrade your system to 2018.2.2. The schedules system jobs will not run every night in this version.
  - ☐ Alison will go in and run the entry
  - ☐ Once upgraded they will default the correct pay code to the correct employee profile.
- Job Costing
  - o They would like to use "Hours codes" within ExecuTime
  - o This would be added on an employee and supervisor level
  - o When these employees clock in using REG P/T they would determine what hours code they worked on while clocked in (via job costing split). They would only like to send over the Hours Code not the REG P/T.
  - ☐ I will look into this and let you know what information is needed.
- Security and Permissions
  - o System Admin > Security and Permissions
  - ☐ This is where all of the permission roles are held
  - ☐ The permission roles determines their Menu Access as well as Data access (Employees /departments they would have access to).
- Schedules System Jobs
  - o System Admin > Scheduled System Jobs > At the top select " Upload an Import Job File" > Browse your computer for the employee.csv (Must be named employee.csv) > Then "Upload Now" > Once uploaded go next to the "Employee Integration" and select "Run This Entry"
  - o We attempted to upload a new Employee.csv but the new employees and the terminated ones did not update.
  - o New Employees: Sean Burdick, Bryan Cummings, and Justin Dehart
  - o Terminated employees: Cody Alberti and Jennifer Marks
  - o We confirmed that the New employees are on the employee.csv with active departments. We also confirmed that the terminated employees were updated on the csv.
  - ☐ I am looking into this.
- August 29th
  - o Updated time clock training to 9:30am PST
  - o End User Super User Overview 8:30am - 9:30am PST

Thanks,  
 Suzi Greene  
 Implementation Consultant  
 Tyler Technologies, Inc.

P: 800.772.2260 ext. 5119

www.tylertech.com

## Comments

Comment by Suzanne Greene (Inactive) [ Aug/29/2018 ]

couldn't connect to look at server log will reach out to client tomorrow

Comment by Suzanne Greene (Inactive) [ Aug/31/2018 ]

was able to connect to server but unable to access server logs - reached out to Talia still unable to locate logs submitted CRM ticket 6478238

Comment by Suzanne Greene (Inactive) [ Sep/05/2018 ]

From: Shaffer, William

Sent: Tuesday, September 4, 2018 3:45 PM

To: Greene, Suzanne &lt;Suzanne.Greene@tylertech.com&gt;

Subject: Case ID: 6478238 - Turlock, CA - Employee Import Issue CRM:060480001259

Hi Suzi,

The employee file cannot contain headers. Please see the following page:

<https://executimesupport.tylertech.com:8446/display/PSI/New+World+Employee+Build>

Have them fix the export, re-upload the file without headers, and then run the job. It should import successfully.

\*\*\*Please note that as of January 15th, ExecuTime Support has a new phone number. Please update your contact information to 800-772-2260.

Our support offices are available Monday through Friday from 7:00AM until 6:00PM CST. For the fastest response, we can be contacted by telephone at (800) 772-2260 or by an email addressed to [ExecuTimeSupport@tylertech.com](mailto:ExecuTimeSupport@tylertech.com).

William Shaffer

Support Line: (800) 772-2260

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Email: ExecuTimeSupport@tylertech.com

www.ExecuTime.com

Comment by Suzanne Greene (Inactive) [ Sep/05/2018 ]

From: Greene, Suzanne

Sent: Wednesday, September 5, 2018 8:20 AM

To: Shaffer, William &lt;William.Shaffer@tylertech.com&gt;

Subject: RE: Case ID: 6478238 - Turlock, CA - Employee Import Issue CRM:060480001259

Thank you William !

Suzi Greene

Implementation Consultant

Tyler Technologies, Inc.

P: 800.772.2260 ext. 5119

www.tylertech.com

Comment by Suzanne Greene (Inactive) [ Sep/05/2018 ]

From: Greene, Suzanne

Sent: Wednesday, September 5, 2018 8:23 AM

To: 'Alison Arias' &lt;AArias@turlock.ca.us&gt;; 'Taryn Perry' &lt;TPerry@turlock.ca.us&gt;

Cc: Henderson, MyKeya &lt;MyKeya.Henderson@tylertech.com&gt;

Subject: Turlock, CA - Employee Import Issue

Good Morning,

I wanted to give you an update in regards to the issue you are having with the employee import. The employee file cannot contain headers. Please fix the report and re-upload the file without headers. Once you upload the new file and re-run it should be successful ☺

Thanks,

Suzi Greene

Implementation Consultant

Tyler Technologies, Inc.

P: 800.772.2260 ext. 5119

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Comment by Suzanne Greene (Inactive) [ Sep/06/2018 ]

From: Greene, Suzanne

Sent: Thursday, September 6, 2018 10:05 AM

To: 'Alison Arias' &lt;AArias@turlock.ca.us&gt;; 'Taryn Perry' &lt;TPerry@turlock.ca.us&gt;

Cc: Henderson, MyKeya &lt;MyKeya.Henderson@tylertech.com&gt;

Subject: Turlock, CA - Weekly Recap

Good Morning,

Thank you for taking time with me for your weekly call. Please see below a recap of items discussed.

- Onsite Agenda

- o I have attached the Onsite Agenda, End User & Super User Templates , and TT2 PowerPoint.

- ☐ Please feel free to make modifications to the Templates attached.

- Pilot Group

- o IT Department and Julie

- ☐ They will NOT clock in/out. They will only submit time off request.

- o Part time employees in the human resources department

- ☐ They will clock in/out as well as submit time off request.

- o These employees will start parallel testing in the system from 9/16/18 – 9/30/18

- Badge Numbers

- o They will add the badge ids for the pilot group that will be using the system

- ☐ System Admin > Master File Management > Employees > Edit the employees profile > Security > Add the badge ID

- Employees Import Issue

- o Alison ran a new job without the header and confirmed that the new and terminated employees are now updating in ExecuTime.

- ☐ I will update and close this ticket

- Pay Code Issue

- o This is still being looked into and I will keep you updated.

Thanks,

Suzi Greene

Implementation Consultant

Tyler Technologies, Inc.

10/8/2019

[#XTNI-26838] Turlock, CA - Employee Import Issue

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Comment by Suzanne Greene (Inactive) [ Sep/07/2018 ]

From: Alison Arias &lt;AArias@turlock.ca.us&gt;

Sent: Friday, September 7, 2018 11:57 AM

To: Greene, Suzanne &lt;Suzanne.Greene@tylertech.com&gt;

Cc: Henderson, MyKeya &lt;MyKeya.Henderson@tylertech.com&gt;; Taryn Perry &lt;TPerry@turlock.ca.us&gt;

Subject: Employee Integration

Importance: High

Hi Suzi,

We found one employee that isn't updating with our employee integration process. That isn't to say there aren't more, but I think we need to re-open the ticket as an issue. James Brewer terminated 7/21/18. I think the only way to ensure this is actually working may be going employee by employee. I am not sure we will have time to do this prior to Suzi's arrival but we will do our best to get through as many as possible. Our initial focus will be on the selected Pilot Groups.

Thank you,

Alison Arias

City of Turlock

Administrative Analyst - Payroll

209.668.5433

Comment by Suzanne Greene (Inactive) [ Sep/07/2018 ]

From: Alison Arias &lt;AArias@turlock.ca.us&gt;

Sent: Friday, September 7, 2018 12:06 PM

To: Greene, Suzanne &lt;Suzanne.Greene@tylertech.com&gt;

Cc: Henderson, MyKeya &lt;MyKeya.Henderson@tylertech.com&gt;; Taryn Perry &lt;TPerry@turlock.ca.us&gt;

Subject: RE: Employee Integration

A little more follow up:

It looks like it is picking up new hires, but not terminated employees.

We have found others that have been terminated in New World (our payroll system) but are not updating through the Employee Integration Process in Executime – the following is not an exhaustive list:

Full Time

Jennifer Marks

Rodney Mintz

Karen Starr

Part Time

Kimberly Canisso

Julia A. Kondratyuk

Thank you for your attention to this issue.

Thank you,

Alison Arias

City of Turlock

Administrative Analyst - Payroll

209.668.5433

Comment by Suzanne Greene (Inactive) [ Sep/07/2018 ]

From: Greene, Suzanne

Sent: Friday, September 7, 2018 12:19 PM

To: 'Alison Arias' &lt;AArias@turlock.ca.us&gt;

Cc: Henderson, MyKeya &lt;MyKeya.Henderson@tylertech.com&gt;; Taryn Perry &lt;TPerry@turlock.ca.us&gt;

Subject: RE: Employee Integration

Happy Friday ☺

I will look into this and get back to you. Quick question for you, How are your terminated employees listed in New World ? Are they listed as "terminated" or just "T" ?

Suzi Greene

Implementation Consultant

Tyler Technologies, Inc.

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Comment by Suzanne Greene (Inactive) [ Sep/11/2018 ]

From: Taryn Perry &lt;TPerry@turlock.ca.us&gt;

Sent: Friday, September 7, 2018 12:28 PM

To: Greene, Suzanne &lt;Suzanne.Greene@tylertech.com&gt;; Alison Arias &lt;AArias@turlock.ca.us&gt;

Cc: Henderson, MyKeya &lt;MyKeya.Henderson@tylertech.com&gt;

Subject: RE: Employee Integration

Hi Suzi,

In New World they are listed as "terminated."

Thanks,

Taryn Perry

City of Turlock

Payroll Coordinator

156 S Broadway Ste 230

Turlock, CA 95380

(209)668-5540 Ext. 1319

Comment by Suzanne Greene (Inactive) [ Sep/19/2018 ]

From: Greene, Suzanne

Sent: Tuesday, September 18, 2018 6:50 PM

To: 'Alison Arias' &lt;AArias@turlock.ca.us&gt;; 'Taryn Perry' &lt;TPerry@turlock.ca.us&gt;

Cc: Henderson, MyKeya &lt;MyKeya.Henderson@tylertech.com&gt;

Subject: Turlock/ExecuTime - Weekly Call Recap

Good Evening,

Thank you for taking time with me today for your weekly call. Please see below a recap of items discussed.

## o Reporting Issue

- The reports were working this morning and when we tested this during our call their reports were not loading and mine said "Can't reach this page"
- I am submitting a ticket for this issue

## o End User &amp; Super User Checklist

- The email template was sent out while on site. Alison has been following up with her employees and supervisors in the pilot group and is still waiting for some of them to confirm they have access.

- Sopheap Dong Carreon was not able to log in

o Her log in did not have a hyphen like her windows log in. We corrected this on our call and tested this with Sopheap. She is now able to log in.

## o Allowing Benefit time to go into the negative

- They are still internally discussing

## o Securities for pay codes that part time employees use

- Alison will send a list to the part time supervisors to see who needs access to what pay codes.
- Once received we will create locations for each department. Then add the correct employees to the correct location.
- We created a location for the HR Part Time employees and added them as they are in the pilot group.

## o Steps to create a location and add employees

- System Admin > Master File Management > Locations.

## o To confirm who is in your location

- Manage Employee Filters ( blue pencil top left corner) > Select Locations > Highlight the location that you would like to verify > Select Apply Filter Now > the employees that are in this location will populate

## o Council employees and planning commissioners will not be exported

o We created a location for them and I will forward this to MyKeya to ensure they are not exported out. The location is labeled "Do Not Export"

o Alison will add the correct employees to the location

## o Auto Deductions for part time employees

o System Admin &gt; Master File Management &gt; Employee &gt; Edit Employee profile &gt; Pay Properties &gt; Fill out the auto deduct threshold and auto deduct time. The auto deduct threshold is the amount of hours they have to exceed to receive the auto deduct time.

o Alison will reach out to the part time supervisors to determine who should get auto deductions lunch and who doesn't.

## o Pay Code Issues

o Reached out to Louis while on call to request this back up for the database be emailed to me since I can not copy it from the server.

o Will submit ticket to development on pay code issues

o 1st Parallel (9/16/18 - 9/30/18)

o They are actively using the system

## o Employee Import Issues

o We checked the CSV file and the terminated employees are not listed on the extract file.

o Alison will submit a ticket with New World to work on this and keep me posted

Thanks,

Suzi Greene



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Comment by Suzanne Greene (Inactive) [ Oct01/2018 ]

From: Greene, Suzanne  
 Sent: Monday, October 1, 2018 2:19 AM  
 To: 'Alison Arias' <AArias@turlock.ca.us>; 'Taryn Perry' <TPerry@turlock.ca.us>  
 Cc: Henderson, MyKeya <MyKeya.Henderson@tylertech.com>  
 Subject: RE: Turlock/ExecuTime - Weekly Call Recap

Good Afternoon,

I will be in Michigan next this onsite with another client. Please copy MyKeya on all communications so that you do not have a delayed response 😊 I did want to check in on a few things as well as give you an update. Please see below.

• **Employee import issue**

o **Have you heard back from new world ? ( I highlighted the notes below)**

• Reporting Issue

o I have submitted a ticket for this.

• Server Log

o Can you please send me the server log from 9/8/18 ?

• 1st Parallel (9/16/18 – 9/30/18)

o How did your first Parallel test go ?

Thanks,

Suzi Greene

Implementation Consultant  
 Tyler Technologies, Inc.

P: 800.772.2260 ext. 5119

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Comment by Suzanne Greene (Inactive) [ Oct09/2018 ]

From: Greene, Suzanne  
 Sent: Tuesday, October 9, 2018 4:59 PM  
 To: 'Alison Arias' <AArias@turlock.ca.us>; 'Taryn Perry' <TPerry@turlock.ca.us>  
 Cc: Henderson, MyKeya <MyKeya.Henderson@tylertech.com>  
 Subject: ExecuTime/Turlock, CA - Weekly Call Recap

Good Afternoon,

Thank you both for taking time with me today for your weekly call. Please see below a recap of items discussed.

**Pay Code Issue**

o Confirmed that the server log 9/7/18 are correct.

o I will forward this over to our tech team

**Export Issue**

o Work date issue and Hours splitting for certain employees

o Pending review from our support team. Once we receive a response we will let you know so that you can re-process PP 9/16/18 - 9/30/18.

1st Parallel 9/16/18 - 9/30/18

o Alison already closed this pay period in the New World Test Database .

o They utilize a Test Database for New World which mimics their live system.

o She will check to see if she can reopen that pay period on the new world side so that this can be processed once the issue above is resolved.

**Employee Import Issue**

o Confirmed that terminated employees are pulling in.

o I will close this ticket

**Locations**

o Confirmed employees in the "Do Not Export" location.

o How to confirm who is in your location

o Manage Employee Filters (blue pencil top left corner) > Expand "Location" > Select the location you would like to verify (if you would like to verify multiple locations hold down the Ctrl key) > Select "Apply Filter Now" and the employees that are in this filter will populate under "Applied Filter matches"

**Reporting Issue**

o We tested this on our call and confirmed that they are able to run reports now 😊

o I will close this ticket

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Thanks,  
Suzi Greene  
Implementation Consultant  
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